



Duty Statement

Request for Personnel Action (RPA) Number 2021-03509	Effective Date
Classification Title Staff Operations Specialist	Position Number 564-735-5335-005
Working Title Filing Division Training Lead	Bureau and Section Filing Methods & Budget Section / e-Programs & Budget

Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. In order to support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the general direction of the Filing Division Training Supervisor in the e-Programs & Budget Section, the Staff Operations Specialist leads the daily operations of the Training Team. The incumbent conducts business area training for the Filing Division. Responsibilities include researching and understanding the more complex Personal Income Tax (PIT) and Business Entity (BE) Income Tax laws, procedures, and all supporting systems. Service as a subject matter expert by making recommendations on and maintaining training material for new and veteran public service staff in the Filing Division for various classifications. The Filing Division Training Lead is expected to continually look to enhance and provide current training information that will expand staff's knowledge, skills, and abilities to effectively and efficiently perform their duties.

Essential Functions

Percentage	Description
50%	Act as the lead, monitor daily operations of the Filing Division Training Team. Monitor workloads and workflow, develop, mentor, and coach training staff. Review all work plans and training scripts developed or enhanced by the Training Team. Attend the initial Training Needs Assessment meeting with the internal customer to provide guidance to the team. Research, evaluate, and make recommendations for existing and new technical and personal development training resources and materials for staff. Contribute to the development of the most complex training. Position will have direct involvement with our hiring processes for incoming staff and for the coordination of Onboarding for new staff to the business area. Act as a liaison for the Filing Division Training Team to other Filing Division and enterprise business areas.
30%	Meet with customers to communicate class/workshop expectations for classroom supervisors, classroom mentors, and students while demonstrating a high degree of professional and technical skills. Attend training/workshop debriefing meetings and assist in recommending improvements for upcoming training sessions. Serve as the subject matter expert for prearranged and on-demand training classes within the Filing Division and the department. Represent the section on teams, committees, group projects, and special assignments which typically address and impact divisional or departmental programs, sensitive/complex issues and procedures.
15%	Evaluate and reengineer the work force processes which may encompass the use of new technologies. Assist with the development of divisional long-range planning, strategies and evaluation measure for training. Analyze, research, and respond to internal and external customer's questions concerning the most complex tax law, accounts, and procedures. Responsible for explaining pertinent legal provisions, regulations, and related administrative practices and their applications to specific scenarios.

Marginal Functions

Percentage	Description
5%	Assist in the development of technology-based applications to streamline the operation of the group to increase efficiency. Gather data, perform testing, and report findings with an issue paper or presentation. Assist with classroom training.

Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)

Signature

Date

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)

Signature

Date